



Lisa Welton <lisa@retirement.capital>

Re: Scottish Widows [CT-1259383]

1 message

Lisa Welton <lisa@retirement.capital>

12 October 2023 at 12:10

To: Simon Pryce <simon@skylightmedia.co.uk>

Cc: \$RetirementClaims <RetirementClaims@scottishwidows.co.uk>, Veronica Walkman <veronica@retirement.capital>

Please find attached HMRC Screenshots dated today. Confirming

- Open Status,
- Scheme Details,
- Membership details.

On Thu, 12 Oct 2023 at 12:03, Simon Pryce <simon@skylightmedia.co.uk> wrote:

Hi Carolyn,

Thank you for that.

Odd,I already sent that proof with the last pack of documents you received.

Let me dig it out and resend it.

Kind regards,

Simon

Simon Pryce MBA CMgr FCMl
Director
Skylight Media
0115 958 6060 or 07970 504 293

Sent from my mobile, so please forgive any typos!

On Thu, Oct 12, 2023, 10:59 \$RetirementClaims <RetirementClaims@scottishwidows.co.uk> wrote:

Classification: Confidential

 **A logo with black text Description automatically generated**

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Good Morning Mr Pryce,

Scottish Widows Transfer request

Thank you for sending over the details of your money helper appointment. I have passed this onto the business area who are responsible for doing our checks before we process claims.

They have advised that we are still waiting for proof dated within the last 30 days that the receiving scheme is registered with HMRC (This can be a screenshot from the HMRC portal).

Kind Regards

Carolyn

Carolyn Shearer (She/Her)

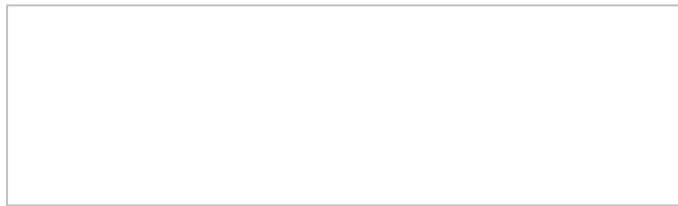
Claims Administrator

Insurance & Wealth Customer Delivery

INSURANCE, PENSIONS & INVESTMENTS CHIEF OPERATING OFFICE (IP&ICOO)

A: 69 Morrison Street, Edinburgh, EH3 1HL E: RetirementClaims@scottishwidows.co.uk

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